> of how far they've gone
> and how far is yet to go. Also, there needs to
> be a "Save Now" button,
> as we discussed, so the user can return on
> another day to finish up the
> document.
>
> Keep up the good work!
>
> --Gabriel
>
> -----Original Message-----
> From: █████████████
> [mailto:██████████████████]
> Sent: ████████████████ 9:23 AM
> To: kgh@heiserlaw.com
> Subject: good morning
>
>
> Gabriel,
>
> I trust you've received the saga from Dan. He's
> going to try to put
> Office
> 2000 on a server at a hosting company we do
> business with today. (John
> forgot to bring his Office 2000 home from his
> office last night to put
> on
> his server.) The issue right now is not what
> we've created, it's the
> muck
> you have to face in dealing with Microsoft
> sometimes. I am awaiting his
> status report. Guess we'll all find out at the
> same time.
>
> In the meantime, why don't you go here:
> http://24.10.1.15/aviatrix/gabriel/indextest.html
>
> This is a very simple, rough idea based on your
> thoughts at our
> meeting--a
> starting point. Disregard any spacing issues,
> and the blank table to the
> right would be the area (doesn't have to be
> this color or this size)
> that
> would contain your questions. All document
> pieces could be pulled up on
> the
> left side. The navigation tools could be at
> that top, as you liked, and,

②

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> of
> course, there would be more than there are now.
>
>
> The "Next Questions" button does not go to a
> working form. I've just
> created this front page to see if I'm even in
> the ballpark. I used the
> domain you were thinking about as something to
> use for now.
>
> Nanette
> > From: ███████████████████████
> To: "Gabriel Heiser \(E-mail\)"
> <kgh@heiserlaw.com>
> Subject: Invoice
> Date: ███████████4:44:30 -0600
>
>
> Hi Gabriel,
>
> Here is the invoice as of████████We have all
> of the technology pieces we
> need on the document generation side. This is
> shaping up to be a nice
> project.
>
>███████6:00 8:00 120 Software development of
> DPA template
>███████3:00 6:00 180 Software development of DPA
> template
>███████7:30 9:30 120 Software development of DPA
> template
>███████9:00 9:45 45 Software development of DPA
> template
>
> ██████5:00 6:30 90 software development of DPA
> (conversion to
> Word)
>█████2:00 3:00 60 Software development of DPA
> (formatting
> changes)
>█████1:00 3:30 150 Software development of DPA
> (development of
> .ASP)
>
> Total as of████████████Hours
>
> This invoice: $█████
>
> Please send a check to my home address:
>
>████████

>
> ▓▓▓▓▓▓▓▓▓▓
> ▓▓▓▓▓▓▓> From: ▓▓▓▓▓▓▓▓▓▓▓▓
> To: <kgh@heiserlaw.com>
> CC: ▓▓▓▓▓▓▓▓▓
> < ▓▓▓▓▓▓▓▓▓▓▓▓,
> ▓▓▓▓▓▓▓▓▓▓▓▓▓
> < ▓▓▓▓▓▓▓▓▓▓▓▓
> Subject: HTML --> Word
> Date: ▓▓▓▓▓▓▓ 08:43:30 -0600
>
>
> Hi again,
>
> As an experiment I opened Word 2000 and told it
> to read the html document I
> just sent you. Then I told it to "Save As" a
> .doc file, and the results are
> enclosed.
>
> With the exception of page breaks this is 95%
> of what will be needed, so I'm
> confident that this will be straightforward. I
> can spend more time on this
> or not, as you wish.
>
> ▓▓▓▓▓
>
>
> > -----Original Message-----
> > From: Gabriel Heiser
> [mailto:kgh@heiserlaw.com]
> > Sent: ▓▓▓▓▓▓▓▓▓▓▓▓ 9:22 AM
> > To: ▓▓▓▓▓▓▓'
> > Cc: ▓▓▓▓▓▓▓▓▓▓▓▓(E-mail)
> > Subject: RE: status
> >
> >
> > John: I'd like to see the prototype to the
> point where it can
> > print out a
> > document with correct formatting, page
> breaks, page
> > numbering, footers (if
> > possible), etc. I decided that once all this
> is shown to
> > work, the next
> > phase should be a "mock up" of the front end,
> which would be
> > essentially a
> > design that captures the user's input and can
> convey the look
> > and feel I
> > believe is one of the distinguishing

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> characteristics of this
> > website. This
> > is what I will need to show to prospective
> investors, so they
> > have a sense
> > of what this is all about. That means that
> the actual coding of the
> > documents themselves could be done on a
> separate timetable;
> > however, we'd
> > need to get the input side almost complete,
> first, so that's
> > where I'd like
> > to allocate our resources. Does that make
> sense to you? Thanks.
> >
> > --Gabriel
> >
> > -----Original Message-----
> > From: ██████ [mailto:████████]
> > Sent: ███████ 7:31 AM
> > To: Gabriel Heiser
> > Subject: status
> >
> >
> > -
> > Gabriel,
> >
> > I've sent Dan the files needed to do the DPA.
> I was able to
> > resolve the
> > numbering issue quickly. I will spend a
> little time (a few hours at
> > most) trying to take the results and
> converting them to a
> > Word Document.
> > I know with complete certainty that this can
> be done somehow. It would
> > wrap the prototype in a ribbon to spit out
> HTML and a Word
> > Document but
> > I don't consider it essential for proving the
> concept. If you
> > think its
> > critical let me know and I will stay on it. I
> assure you that there is
> > probably a simple, elegant solution and that
> if not it can be
> > manufactured.
> >
> > I believe that this will end my contribution
> to this portion.
> > I have ██

— P —

> > hours in and will send an invoice when I
> figure out how to do the Word
> > conversion.
> >
> > John
> >
>
> > From: █████████████████████████
> To: <kgh@heiserlaw.com>
> CC: █████
>████████████████████████████
████████████████ \(E-mail\)"'
> Subject: RE: status
> Date: ████████████ 08:39:24 -0600
>
>
> I think we're saying the same thing, but I'm
> not sure.
>
> What I sent Dan will produce a document in HTML
> that is formatted correctly
> in terms of the contents. Since there aren't
> any 'pages' in HTML there are
> no page numbers or page breaks. I've attached a
> copy of that sample output
> to this message so you can see that. The logic
> does work and it does
> selectively include portions of text and
> paragraphs. This would lead to a
> demo where input screens were filled in, OK
> clicked, and the browser would
> show the resulting document. You could then use
> the browser Print button to
> display the result. The result would be correct
> and complete, it would just
> not be a Word document with page numbers.
>
> I agree that making the input side look good
> should be the next priority,
> which is why I wasn't emphasizing spending a
> lot of time at this point
> creating a Word document.
>
> With the understanding that we can now, today,
> produce DPA output that will
> display in the browser as correct in content
> and in form (although lacking
> page breaks and numbers because there are no
> pages) do you want to:
>
> (a) go ahead and create an actual Word document
> at this point

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> (b) not spend more time on document creation so
> that the focus can stay on
> the input side
>
> Either way will be fine with me.
>
> John
>
>
> > -----Original Message-----
> > From: Gabriel Heiser
> [mailto:kgh@heiserlaw.com]
> > Sent ██████████████████ 9:22 AM
> > To: ████████'
> > Cc: ████████████████ (E-mail)
> > Subject: RE: status
> >
> >
> > John: I'd like to see the prototype to the
> point where it can
> > print out a
> > document with correct formatting, page
> breaks, page
> > numbering, footers (if
> > possible), etc. I decided that once all this
> is shown to
> > work, the next
> > phase should be a "mock up" of the front end,
> which would be
> > essentially a
> > design that captures the user's input and can
> convey the look
> > and feel I
> > believe is one of the distinguishing
> characteristics of this
> > website. This
> > is what I will need to show to prospective
> investors, so they
> > have a sense
> > of what this is all about. That means that
> the actual coding of the
> > documents themselves could be done on a
> separate timetable;
> > however, we'd
> > need to get the input side almost complete,
> first, so that's
> > where I'd like
> > to allocate our resources. Does that make
> sense to you? Thanks.
> >
> > --Gabriel
> >
> > -----Original Message-----

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> ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓
> > Sent: ▓▓▓▓▓▓▓▓▓▓▓▓ 7:31 AM
> > To: Gabriel Heiser
> > Subject: status
> >
> >
> >
> > Gabriel,
> >
> > I've sent Dan the files needed to do the DPA.
> I was able to
> > resolve the
> > numbering issue quickly. I will spend a
> little time (a few hours at
> > most) trying to take the results and
> converting them to a
> > Word Document.
> > I know with complete certainty that this can
> be done somehow. It would
> > wrap the prototype in a ribbon to spit out
> .HTML and a Word
> > Document but
> > I don't consider it essential for proving the
> concept. If you
> > think its
> > critical let me know and I will stay on it. I
> assure you that there is
> > probably a simple, elegant solution and that
> if not it can be
> > manufactured.
> >
> > I believe that this will end my contribution
> to this portion.
> > I have ▓▓▓
> > hours in and will send an invoice when I
> figure out how to do the Word
> > conversion.
> >
> > John
> >
> >
▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓
> To: <kgh@heiserlaw.com>
> Subject: RE: Status.
> Date: ▓▓▓▓▓▓▓▓ 09:40:23 -0600
>
>
>
> > John: I like the "barrier to entry"....!
>
> This is part of the investor game; addressing
> the barriers to entry is one
> of those "must have" items that will have to go

> into your business plan. You
> should emphasize that you have developed a
> proprietary solution, and suggest
> that you are investigating a patent. Investors
> love this. We got several
> doors slammed in our face because we didn't
> have a lock on what we were
> doing. We spent too much time talking about the
> wonderful open standards;
> investors don't want to hear that. They want to
> hear that no one will be
> able to reproduce this, and if someone tries
> you can sue them out of
> business.
>
> There probably is a patent lurking in there
> somewhere; "Method and system
> for dynamic document construction based on
> rules and queries". It wouldn't
> stop anyone from doing it a different way but
> it presents the illusion of
> substance.
>
> John
>
> > From: ▮▮▮▮▮▮▮▮▮▮▮" ▮▮▮▮▮▮▮▮@▮▮▮▮▮▮▮>
> To: <kgh@heiserlaw.com>
> Subject: Re: Prototype site progress as of
>▮8:18AM ▮▮▮▮
> Date: ▮▮▮▮▮▮▮▮▮ 00:41:01 -0600
>
> Gabriel, ▮▮▮▮▮▮▮▮▮▮ what follows is my
> promised email about the possible
> "HotDocs project", which might be good reading
> but certainly contains several lists.
>
> John and I met late Friday and I have spent a
> little followup time since then learning about
> the
> technologies he is enthusiastic about. I
> believe it is time for us all to meet and
> flesh out the three phase plan which emerged
> from Friday's discussion.
>
> In general terms this is a plan to build a
> system which can 'build documents based
> on conditions which result from applying the
> answers to a series of questions to a set
> of rules that control the generation of a
> document'. This is intended to be similar in
> functionality to the product Gabriel uses but
> will require transferring a great deal of
> content, rules, and user input screens from

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> HotDocs to the new system.
>
> This new system will have, at its heart, a
> document generation engine based on the
> Microsoft Document Object Model (DOM) and XML.
> It will be driven on the user end
> by an input module which can query the customer
> with sets of questions, then provide further
> queries as a function of answers to prior
> questions. It will be encapsulated in a web
> site
> from which customers select documents, engage
> in the question and answer process,
> and which then generates and provides the
> customized document.
>
> It is an ambitious undertaking and a highly
> tedious task for all members of our team:
>
> -- ███████████ will build the site and each
> individual data entry screen;
> -- ██████████ will provide technical direction
> and actual code, ranging from samples to
>   pieces of the functioning whole;
> -- Gabriel will have to specify the entry
> screens, rules, and content, and
> -- I will take on the role of project manager,
> system designer, and primary coder.
>
> The goal, should we somehow reach it, is the
> creation of a site which:
>
> -- Looks professional.
> -- Explains the process and offers products.
> -- Drives the entire query process.
> -- Takes payment.
> -- Generates documents.
>
> Since this is a rather lofty task whose
> successful deployment within any reasonable
> budget
> would border on a miracle, a phased
> implementation is appropriate. This permits to
> ask
> important questions at the completion of each
> phase:
>
> -- Is it reasonable to proceed?
> -- If so, or even if not, what would need to be
> done to complete the next phase?
> -- What is the cost of moving forward?
>
> PHASE 1

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>
> Phase 1 is a "test the concept" phase. ▉▉▉
> ▉▉▉ who, after serving as two technical
> thirds of a company for a decade which built
> (among other things) a significant 32 bit
> multi user multi tasking operating system years
> before Windows 95, tend to be energized
> (as opposed to discouraged) by challenges like
> the one before us. And ▉▉▉▉▉▉
> who completed a mortgage site which feeds loan
> applications directly into a proprietary
> product, a health information site which
> filters information from third party sources
> and
> customizes it to your needs, a complete auction
> site for wealthy people, an online bartering
> business to business system for surplus
> merchandise, the ▉▉▉▉▉▉ite, and
> several other projects within the time frame of
> a year, tend to be energized (as opposed to
> discouraged) by challenges like the one before
> us. Gabriel is in good hands. Still, it is
> better to take small steps, and phase 1 is just
> a step:
>
> -- Create a simple, functional "mock up site"
> which serves no purposes other than to
> inspire questions and let us into the phase one
> sample.
> -- Build the input system to the point that it
> can demonstrate that it's possible to send
> input screens to the user, respond to
> questions, and conditionally send subsequent
> pages requesting additional information.
> -- See what those pages might look like.
> — Develop a prototype engine which can
> retrieve prototype rules, combine them with the
> prototype questions, engage in a limited set of
> "if this say this" type operations, and:
> -- Generate a prototype document.
>
> In our meeting we should only decide whether to
> do phase one and flesh out a few details
> of what it entails.
>
> PHASE 2
>
> In Phase 2, several things would happen:
>
> -- The mock up site would begin to look like a
> real one.
> -- The simplest document which Gabriel can
> provide would be selected.

— /4/ —

> -- All the input screens needed to interact
> with a customer for this document would be
> created.
> -- All the logic needed to generate this
> document would be added to the engine.
> -- The creation of an HTML based product would
> be possible.
> -- Anything else we decide from phase 1 would
> be included.
>
> PHASE 3
>
> After Phase 2 we would be certain that it is
> possible to complete the site. Phase 3 becomes
> a push toward the version of a site which
> customers could visit and generate documents
> and
> generate revenues. This means that:
>
> -- The site itself has to get polished with the
> graphics and HTML needed for a consistent,
>   professional look and feel ▮▮▮▮▮▮▮
> -- Enough content has to be ▮▮▮▮▮▮ make it
> useful (Gabriel)
> -- The engine has to be enhanced for all types
> of conditions required by all documents▮▮▮▮▮
> -- All pending technical complexities would
> have to be tackle▮▮▮▮▮▮
>
> If we ever get to a Phase 4, it would probably
> have to be funded by customer use of Phase 3.
> It could include:
>
> -- Enhanced input methods.
> -- Enhanced output methods.
> -- Enhanced management tools.
>
> My guestimate is that:
>
> -- Phase 1 would require 6 man days spread out
> over the course of 3 weeks.
> -- Phase 2 would require a few man weeks spread
> out over the course of a couple of months.
> -- Phase 3 would require a few man months
> (mostly Gabriel, all that input) spread out
> over several months.
> -- Phase 4 would be completed before
> ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮would be
> great, and▮▮▮▮
> ▮▮▮▮▮▮▮would be stunning.
>
> There is a potential for phase 5. In phase 5
> we either make so much money or get capital and

- /5 -

> turn the whole thing into a product. The
> chances of the completion of phase 5 are:
>
> -- Much greater than the chance that you can
> find the one lost copy of the 3 original copies
> of the
>   Magna Carta, choose to cut it up into pieces
> with one letter on each piece, put them in a
>   duffel bag, take it up in a biplane over a
> straight country road, dump it out, and see
> that the
>   little pieces of paper have fallen into a
> direct line which recreates the original text.
> -- Much less than the chance that raising my
> blue Pilot "Precision Point" pen over the
> carpet
>   and releasing it could result in the pen
> being sucked to the carpet of my study by the
> force
>   of gravity.
>
> I've spent my life going for that Magna Carta
> possibility, but continue to hedge my bets on
> the
> blue pen. With this thought, and the sincere
> hope that I have entertained better than I have
> informed
> or provoked you all, I shall sign off and look
> forward to a discussion of phase 1.
>
> --
> ▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬
> To: <kgh@heiserlaw.com>
> ▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬
> Subject: programming for the complete dummy
> (me!)....
> Date:▬▬▬▬▬▬▬▬ 08:39:31 -0600
>
> > John: I was reviewing a book at the
> bookstore, trying to crack this nut.
> > Forgive me if this makes no sense, but I just
> can't see why I have to pay
> > HotDocs ▬▬▬▬
>
> As Dan's message mentioned, there are ways
> around it, but its still a
> nice little data processing system.
>
> >1. Would you use PERL to do the programming,
> since it contains more robust
> >text manipulation features, as compared to,
> say, VBScript, JScript or
> >JavaScript? Also, some of these only run on IE

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> and not Netscape, I
> >understand, and I need to be available on both
> platforms.
>
> Its hard to say at this point. A lot would
> depend on how the data was
> stored and retrieved. This isn't so much a
> string processing problem as
> a logic/control flow issue. Any solution would
> run on both browsers.
>
> > 2. Would the program be on the client-side or
> server-side, and how do you
> > make that decision? It seems to me that you'd
> use the client-side for the
> > initial inputs, then use the server-side to
> run the word-processing part
> > (the 100-page documents with all the IF
> statements, conditional text, etc.).
> > The book said that servers are usually more
> powerful, but also get overtaxed
> > sometimes. So where does that leave me? I
> defer to you....
>
> Thats an accurate description; the browser is
> used to collect (and can
> perform some verification through JavaScript)
> and the server is used to
> do the work. If the server gets overtaxed that
> means you're successful
> and buy more servers :-)
>
> > 3. Why couldn't one just take my HotDocs
> forms, which are just MSWord
> > document templates, really, with conditional
> text and text that must be
> > replaced with conditional substitutions
> (e.g., the client's name, wife's
> > name, etc.), for the most part, and dump it
> into a PERL program or script?
> > Evidently PERL can do the search-and-replace
> variables and of course can do
> > the logic-controlled conditional text, too.
> The programming couldn't be that
> > complicated.
>
> As we say, bring it into the shop and we'll put
> it up on the rack :-) It
> could turn out to be that straightforward, or
> there could be subtleties.
>
> The key thing in projects like this is the
> value of a person's time.

— /7—

> This is a simple programming task, but all that
> means is that it not
> intellectually challenging. It can still take
> 300 hours or time of
> coding and testing to develop. A brick wall is
> very simple; the expense
> is all in time and materials. I'm not trying to
> be evasive, computers
> aren't hard and experienced people like myself
> and Dan have access to a
> very large toolbox. We are not sweating how to
> do it; once we really
> understand how it runs by seeing it and
> spending time with it the
> solution will present itself. The programming
> part is the easy part :-)
>
> The right thing to do is to meet and talk about
> the options and whether
> you want to develop a prototype and go for
> investment or whether you
> want to go ahead and fund the real deal. I
> recommend a prototype so that
> we can find out now where the problems (or the
> lack thereof) reside.
>
>
> ████
>
> cc: ████████████████████████████████   *Oldest message*
> To: <kgh@heiserlaw.com>
> Subject: HotDocs, Onlink, and so forth....
> Date: ████████ 11:11:48 -0600
>
> Gabriel,
>
> While we are never interested in burning
> bridges or turning away business, the results
> of
> my analysis, which I present here, are less
> than encouraging.
>
> Your concept is clear and simple enough. You
> have a tremendous investment developing what
> amount to algorithms for generating legal
> documents as a result of a series of questions
> which
> the consumer could, given the technology,
> directly ask.
>
> Putting this all on the web and generating
> those documents for a fee would indeed be a
> compelling

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> business to be in. This would require that a
> web site use the control files which have been
> created as a result of your long hours of work
> to guide a browser through a series of nice
> looking
> questions, generate an "answer file" or some
> equivalent, then use that to execute the
> hotdocs
> engine, or some equivalent, to generate a word
> document, or some equivalent.
>
> The following technical issues would need to be
> resolved in order to accomplish this:
>
> 1. The format of the control files which the
> software uses to store the dialog boxes and
> generation rules (the conditional execution of
> code, etc) would have to be completely
> understood.
> I have examined these control files using very
> powerful tools and determined that they are a
> fairly simple mixture of binary and textual
> data. However, to complete the analysis would
> require:
>   a) Getting the vendor to simply supply us
> with the information. They would have to give
> us
>   complete access to a technician and/or
> their own inhouse documentation of the internal
>   workings of their software. Since they
> have a product which competes with what we
> would
>   be obviously building, this is so
> unlikely that I'm not going to waste my time
> asking.
>   b) Reverse engineering the formats. This
> would involve getting hex dumps of the various
> files,
>   making small changes to the dialog boxes
> and macros, then looking at hex dumps of the
>   revised files and "figuring out" what
> changed. Since I spent years doing things like
> figuring
>   out the format of such data sources as
> Tennessee medicaid claims tapes and floating
> point
>   formats of odd laboratory computers, I
> could probably pull this off. It would take
> anywhere
>   from several weeks to several months of
> full time labor.
>
> 2. The operation of the engine would have to

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> be reproduced in its entirety to avoid buying
> it from
>   them. Once the formats were reverse
> engineered, a team of programmers such as our
> mutual
>   friend███████ and myself could easily
> accomplish this in a half a year.
>
> 3. Some mechanism for generating word
> documents would have to be employed. I've
> asked around
>   and found somebody who actually runs Word
> as a service on an NT box that indeed generates
>   document files on the fly. It's a highly
> unstable situation which requires constant
> babysitting.
>   We don't think that the actual format of
> Word documents is documented, and I'm not going
> to
>   waste my time calling Microsoft and ask
> for their inner secrets, either.
>
> All in all, I think that the $█████ or the
> online form of their product sounds like a good
> deal. That
> site does, by the way, work fine in my browser,
> which is Internet Explorer ███████   I
> believe that
> the cost of reproducing this functionality
> would be much higher than █████ but you are
> more than
> welcome to show my email to anybody else and
> see if you can find somebody who knows more
> about how to go about this.
>
> We have discussed the situation and think that
> the best bet is to buy into their engine, then
> build
> a web site around their technology which offers
> your documents as a service. This site would
> require
> a nice look, explanations, e-commerce, and so
> forth. THIS is a job we would be VERY
> interested
> in pursuing.
>
> I look forward to hearing any thoughts and/or
> reactions you have.
>
> Regards,
>
> ████████

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